

## **2004 Survey of Licensees**

**April 2004**

Prepared by:

Dr. Carolyn L. Funk, Director of the Commonwealth Poll  
Associate Professor, School of Government and Public Affairs  
VCU Center for Public Policy  
Virginia Commonwealth University

### **Study Background and Method**

The Virginia Department of Alcoholic Beverage Control contracted with the VCU Center for Public Policy to conduct a telephone survey with a representative sample of licensees. This survey was conducted April 19-25, 2004.

The questionnaire included questions on:

- I. Mission of the Department
- II. Information, Agents, and Inspections
- III. Awareness of Services
- IV. Evaluation of ABC Stores
- V. Web Site Usage

The respondents were selected from a simple random sample of establishments holding a license to sell alcoholic beverages with the Virginia Department of Alcoholic Beverage Control. The list of establishments constituting the population for the survey was provided by the Department. There were 14,028 establishments at the time; out of state establishments were not included in the sampling frame. 807 establishments completed the survey. The cooperation rate for the survey was 79%. The response rate was 76% using the Council of American Survey Research Organization (CASRO) calculations.

Questions answered by the full sample of 807 respondents are subject to a sampling error of plus or minus approximately 4 percentage points at the 95 percent level of confidence. This means that in 95 out of 100 samples like the one used here, the results obtained should be no more than 4 percentage points above or below the figure that would be obtained by interviewing all licensed establishments. Where the answers of subgroups are reported, the sampling error would be higher. This occurs, for example, in the skip patterns of the questionnaire where questions were asked of only a portion of the sample. Because of non-response (refusals to participate, etc.), standard calculations of sampling error are apt to understate the actual extent to which survey results are at variance with the true population values. Surveys are also subject to errors from sources other than sampling. While every effort is made to identify such errors, they are often difficult or impossible to measure. Readers making use of the results are urged to be mindful of the limitations inherent in survey research.

### **Summary of Findings**

#### **Mission of the Department**

- About half of licensees (51%) are very or extremely satisfied with the customer service provided by the Department, 42% are satisfied and 4% are not too or not at all satisfied.
- Better than seven in 10 licensees (73%) consider the Department very or extremely effective in promoting the responsible sale and consumption of alcohol. 18% say the Department is somewhat effective and 3% consider it not too or not at all effective.

### Information, Agents, and Inspections

- Eight in ten licensees think the information provided on the regulations is extremely or very clear, 15% think it is somewhat clear, and 4% think it is not too or not at all clear. The same pattern was also found in 2002.
- Similar ratings were made about the clarity of information provided on responsibilities of license holders. 82% think the Department is extremely or very clear on this, 12% think it is somewhat clear, and 3% think it is not too or not at all clear.
- About four in ten (41%) respondents know the name of the agent assigned to their establishment. A total of 72% know the location or phone number of the regional office to contact for assistance.
- About six in ten respondents (59%) are aware of an inspection in the last 12 months. Among this group, 78% think the inspection provided a great deal or quite a lot of helpful feedback for avoiding future violations. 14% said the feedback provided was not much or not at all helpful for avoiding future violations.

### Awareness of Services

- Licensee awareness of Department programs and services is highest for publications and brochures on responsible serving and “do not sell” stickers and date decals. 85% and 86% of licensees, respectively, have heard of these programs.
- Six in ten licensees have heard of the holiday campaign “none for the road”. Awareness of this campaign is up sharply compared to 2002. Two years ago a majority at 54% were unaware of this program.

	2004		2002	
	Heard of	Not Heard	Heard of	Not Heard
Publications or brochures...	86%	13%	79%	20%
Do not sell stickers or decals	85%	15%	80%	18%
Training such as TIPS or MART*	74%	24%	69%	29%
Toll-free number...	65%	34%	61%	37%
Holiday campaign “none for the road”	60%	38%	44%	54%

- Seventy-eight percent of licensees receive the Department newsletter. A majority of recipients (53%) consider the newsletter extremely or very useful. 37% say it is useful and 8% say it is not too or not at all useful.

### Evaluation of ABC Stores

35% of survey respondents were mixed beverage licensees. These respondents were asked to rate the ABC stores in a variety of areas.

- Approximately six in ten mixed beverage licensees rated the ABC stores as excellent or very good on all areas asked. The highest proportion considered the ABC stores to be excellent or very good on product variety (67%). Convenience of store hours was rated excellent or very good by the smallest portion (59%).

Ratings Among Mixed Beverage Licensees	Excellent or Very Good	Good	Fair or Poor
Variety of products	67%	20%	10%
Convenience of locations	66%	24%	8%
Access to pickup areas	62%	25%	9%
Convenience of hours	59%	29%	9%

- Eighty-five percent of mixed beverage licensees say the staff at ABC stores provides helpful service always or most of the time. 13% say the staff is helpful sometimes or less often.

- Eight in ten consider the staff at ABC stores well informed about the products always or most of the time. 12% say they are sometimes well informed and 4% think they are well informed less often than that.
- Three-quarters of mixed beverage licensees are extremely or very satisfied with the customer service provided by ABC stores. Twenty percent are satisfied and 3% are not too or not at all satisfied.
- Forty-seven percent of mixed beverage licensees say they would be very or somewhat likely to use Sunday store hours while 52% are not too or not at all likely to do so.
- Six in ten mixed beverage licensees say they would be very or somewhat likely to place orders through the ABC web site, 38% are not too or not at all likely to do so.

### Web Site Usage

- Seventeen percent of all licensees have used the ABC web site. This is up from 6% in 2002.
- Of those who have used the ABC web site, the most common use was to find laws or regulations. 78% of all web site users have looked at the web site to find laws and regulation information. The least common use was product and pricelist information. 39% of all web site users have looked at the web site for product or pricelist information.

### 2004 Survey of Licensees

April 19-25, 2004

807 respondents

Margin of error +/- 4 percentage points

#### I. Mission

**Q1.** Overall, how satisfied are you with the customer service provided by the Department—extremely satisfied, very satisfied, satisfied, not too satisfied, or not at all satisfied?

	2004
Extremely Satisfied	17%
Very Satisfied	34%
Satisfied	42%
Not Too Satisfied	2%
Not At All Satisfied	2%
Don't Know	2%
No Answer	2%

**Q2.** How effective is the Department in promoting the responsible sale and consumption of alcoholic beverages—extremely effective, very effective, somewhat effective, not too effective, or not at all effective?

	2004	2002
Extremely Effective	22%	21%
Very Effective	51%	50%
Somewhat Effective	18%	18%
Not Too Effective	2%	3%
Not At All Effective	1%	1%
Don't Know	3%	5%
No Answer	2%	2%

## II. Information, Agents, and Inspections

**Q3.** How clear is the information provided by the Department about the regulations--extremely clear, very clear, somewhat clear, not too clear, or not at all clear?

	2004	2002
Extremely Clear	31%	33%
Very Clear	49%	46%
Somewhat Clear	15%	16%
Not Too Clear	3%	2%
Not At All Clear	1%	1%
Don't Know	0%	1%
No Answer	0%	0%

**Q4.** How clear is the guidance from ABC agents about your responsibilities as a license holder--extremely clear, very clear, somewhat clear, not too clear, or not at all clear?

	2004	2002
Extremely Clear	33%	36%
Very Clear	49%	46%
Somewhat Clear	12%	11%
Not Too Clear	3%	2%
Not At All Clear	0%	1%
Don't Know	1%	3%
No Answer	1%	1%

**Q5.** Do you happen to know the name of the agent assigned to your establishment?

	2004	2002
Yes	41%	40%
No	54%	60%
No Answer	5%	0%

**Q6.** Do you know the location of the regional office that you can contact for additional assistance?

	2004	2002
Yes	68%	63%
No	25%	37%
Know Phone Number Only (Volunteered)	4%	
Don't Know	2%	0%
No Answer	0%	0%

**Q7.** Did your agent conduct an inspection in the last 12 months, or not, or don't you know whether or not an inspection took place in the last 12 months?

2002 Question wording: Has your agent conducted an inspection in the last 12 months?

	2004	2002
Yes	59%	67%
No	13%	20%
Don't Know If Inspection Occurred	24%	
Don't Know	4%	13%
No Answer	1%	0%

**Q8. IF INSPECTED IN LAST YEAR:** To what extent did the inspection provide feedback which will help your business or group avoid future violations-a great deal, quite a lot, not much, or not at all?

	<b>2004</b>	<b>2002</b>
A Great Deal	46%	42%
Quite A Lot	32%	32%
Not Much	10%	12%
Not At All	4%	4%
Don't Know	5%	7%
No Answer	3%	2%
<b>Number Of Respondents</b>	<b>429</b>	<b>549</b>

### III. Awareness of Services

Next, we'd like to know if you have heard of some of the services and programs offered by the Department of ABC. For each, please tell me whether or not you have heard about this before. First,

#### ORDER OF Q9 to Q13 WAS ROTATED.

**Q9.** A toll free phone number where you can report suspected violations of ABC laws?  
(Have you or haven't you heard about that before?)

	<b>2004</b>	<b>2002</b>
Yes, Heard Before	65%	61%
No, Haven't Heard	34%	37%
Don't Know	1%	2%
No Answer	0%	0%

**Q10.** A training program on responsible sales and serving such as TIPS or MART?  
(Have you or haven't you heard about that before?)

2002 Question wording: A training program on responsible sales and serving known as TIPS?

	<b>2004</b>	<b>2002</b>
Yes, Heard Before	74%	69%
No, Haven't Heard	24%	29%
Don't Know	1%	2%
No Answer	0%	0%

**Q11.** The Holiday Campaign "None for the Road"?  
(Have you or haven't you heard about that before?)

	<b>2004</b>	<b>2002</b>
Yes, Heard Before	60%	44%
No, Haven't Heard	38%	53%
Don't Know	1%	3%
No Answer	0%	0%

**Q12.** "Do not sell" stickers and date decals?  
(Have you or haven't you heard about that before?)

	<b>2004</b>	<b>2002</b>
Yes, Heard Before	85%	80%
No, Haven't Heard	15%	18%
Don't Know	1%	2%
No Answer	0%	0%

**Q13.** Publications or brochures on selling and serving responsibly by the Department of ABC?  
(Have you or haven't you heard about that before?)

	<b>2004</b>	<b>2002</b>
Yes, Heard Before	86%	79%
No, Haven't Heard	13%	20%
Don't Know	1%	1%

#### **Summary on Awareness of Programs and Services Q9-Q13**

	<b>2004</b>		<b>2002</b>	
	<b>% Heard of</b>	<b>% Not Heard</b>	<b>% Heard of</b>	<b>% Not Heard</b>
Do not sell stickers or decals	85%	15%	80%	18%
Publications or brochures...	86%	13%	79%	20%
Training such as TIPS or MART*	74%	24%	69%	29%
Toll-free number...	65%	34%	61%	37%
Holiday campaign none for the road	60%	38%	44%	54%

**Q14.** Do you receive the Department's licensee newsletter?

	<b>2004</b>	<b>2002</b>
Yes	78%	70%
No	15%	24%
Don't Know	7%	6%
No Answer	0%	0%

**Q15.** IF RECEIVE NEWSLETTER: To what extent do you find the newsletter useful-would you say it is extremely useful, very useful, useful, not too useful, or not at all useful?

	<b>2004</b>	<b>2002</b>
Extremely Useful	14%	15%
Very Useful	39%	34%
Useful	37%	42%
Not Too Useful	7%	6%
Not At All Useful	1%	2%
Don't Know	2%	1%
No Answer	0%	0%
<b>Number Of Respondents</b>	<b>628</b>	<b>573</b>

#### **IV. Evaluation of ABC Stores**

**Q16.** My next few questions concern mixed beverage services.  
Do you hold a mixed beverage license?

	<b>2004</b>	<b>2002</b>
Yes	35%	31%
No	64%	67%
Don't Know	1%	3%
No Answer	0%	0%

IF HOLD MIXED BEVERAGE LICENSE:

Next, I'd like you to rate the ABC stores on each of the following. First,  
ORDER OF Q17 TO Q20 ROTATED

**Q17. The variety of products available in ABC stores?**

(Would you say the variety of products available in ABC stores is excellent, very good, good, fair, or poor?)

	<b>2004</b>	<b>2002</b>
Excellent	35%	34%
Very Good	32%	29%
Good	20%	25%
Fair	8%	7%
Poor	2%	2%
Don't Know	1%	2%
No Answer	1%	0%
<b>Number Of Respondents</b>	<b>279</b>	<b>249</b>

**Q18. Convenience of store hours?**

(Would you say the convenience of store hours is excellent, very good, good, fair, or poor?)

	<b>2004</b>	<b>2002</b>
Excellent	30%	29%
Very Good	29%	31%
Good	29%	24%
Fair	6%	10%
Poor	3%	2%
Don't Know	1%	2%
No Answer	1%	1%
<b>Number Of Respondents</b>	<b>279</b>	<b>249</b>

**Q19. Convenience of store locations?**

(Would you say the convenience of store locations is excellent, very good, good, fair, or poor?)

	<b>2004</b>	<b>2002</b>
Excellent	32%	35%
Very Good	34%	28%
Good	24%	24%
Fair	6%	5%
Poor	2%	6%
Don't Know	0%	1%
No Answer	1%	0%
<b>Number Of Respondents</b>	<b>279</b>	<b>249</b>

**Q20. Access to pickup areas from the parking lot or rear of the store?**

(Would you say access to pickup areas from the parking lot or rear of the store is excellent, very good, good, fair, or poor?)

	<b>2004</b>	<b>2002</b>
Excellent	33%	28%
Very Good	29%	30%
Good	25%	26%
Fair	4%	8%
Poor	5%	2%
Don't Know	2%	5%
No Answer	1%	1%
<b>Number Of Respondents</b>	<b>279</b>	<b>249</b>

## Summary of Ratings Among Mixed Beverage Licensees

	Excellent or Very Good	Good	Fair or Poor
Variety of products	67%	20%	10%
Convenience of locations	66%	24%	8%
Access to pickup areas	62%	25%	9%
Convenience of hours	59%	29%	9%

**Q21.** How often would you say the staff at ABC stores provides helpful service-always, most of the time, sometimes, not too often, or never?

	2004	2002
Always	61%	55%
Most Of The Time	24%	31%
Sometimes	8%	8%
Not Too Often	4%	2%
Never	1%	0%
Don't Know	0%	4%
No Answer	1%	1%
<b>Number Of Respondents</b>	<b>279</b>	<b>249</b>

**Q22.** How often would you say the staff at ABC stores are well-informed about the products-always, most of the time, sometimes, not too often, or never?

	2004	2002
Always	43%	40%
Most Of The Time	37%	37%
Sometimes	12%	15%
Not Too Often	4%	2%
Never	0%	0%
Don't Know	2%	6%
No Answer	2%	0%
<b>Number Of Respondents</b>	<b>279</b>	<b>249</b>

**Q23.** The Department is planning to offer store hours on Sundays in some locations. How likely would you be to use an ABC store for your establishment on Sundays-very likely, somewhat likely, not too likely, or not at all likely?

	2004
Very Likely	26%
Somewhat Likely	21%
Not Too Likely	23%
Not At All Likely	29%
Don't Know	1%
No Answer	0%
<b>Number Of Respondents</b>	<b>279</b>

**Q24.** The Department is considering an option to allow orders to be placed through the ABC web site. How likely would you be to place orders for your establishment through the ABC website if that service were available-very likely, somewhat likely, not too likely, or not at all likely?

	2004	2002
Very Likely	40%	42%
Somewhat Likely	20%	15%
Not Too Likely	15%	13%
Not At All Likely	23%	26%
Don't Know	1%	3%
No Answer	0%	2%
<b>Number of respondents</b>	<b>279</b>	<b>249</b>



**Q25.** Overall, how satisfied are you with the customer service provided by ABC stores—extremely satisfied, very satisfied, satisfied, not too satisfied, or not at all satisfied?

	<b>2004</b>
Extremely Satisfied	33%
Very Satisfied	42%
Satisfied	20%
Not Too Satisfied	2%
Not At All Satisfied	1%
Don't Know	1%
No Answer	1%
<b>Number Of Respondents</b>	<b>279</b>

#### **V. Web Site Usage**

**Q26.** Have you ever used the ABC web site?

	<b>2004</b>	<b>2002</b>
Yes	17%	6%
No	83%	94%
No Answer	0%	0%
<b>Number Of Respondents</b>	<b>807</b>	<b>815</b>

IF HAVE USED ABC WEB SITE:

Please tell me if you ever used the ABC web site for each of the following:

#### **ORDER OF Q27 TO Q31 ROTATED**

**Q27.** Product or pricelist information?

(Have you ever used the ABC web site to find product or pricelist information?)

	<b>2004</b>	<b>2002</b>
Yes	39%	36%
No	60%	63%
No Answer	1%	0%
<b>Number Of Respondents</b>	<b>136</b>	<b>47</b>

**Q28.** Licensing and renewal information?

(Have you ever used the ABC web site to find licensing and renewal information?)

	<b>2004</b>	<b>2002</b>
Yes	56%	47%
No	44%	53%
<b>Number Of Respondents</b>	<b>136</b>	<b>47</b>

**Q29.** Department Forms to Download?

(Have you ever used the ABC web site to find Department Forms to Download?)

	<b>2004</b>	<b>2002</b>
Yes	44%	40%
No	54%	57%
Don't Know	2%	2%
<b>Number Of Respondents</b>	<b>136</b>	<b>47</b>

**Q30. Educational or prevention information?**

(Have you ever used the ABC web site to find educational or prevention information?)

	<b>2004</b>
Yes	60%
No	38%
Don't Know	1%
<b>Number Of Respondents</b>	<b>136</b>

**Q31. Laws or regulations?**

(Have you ever used the ABC web site to find laws or regulations?)

	<b>2004</b>
Yes	78%
No	22%
<b>Number Of Respondents</b>	<b>136</b>